

## HOW2 VIDEO TRANSCRIPT

### Docman 10 - Coding

Coding in Docman is completed in the 'Tasks' section.

A document can be given a 'Document Code' such as 'Discharge Letter' or 'Result' when the document is filed, but the detailed coding is completed in the Tasks section.

To go to your Tasks, click on the Tasks icon at the top of the screen.

Before we get into the functionality, it's important to understand how Docman works regarding Coding Tasks.

Docman splits the Tasks functionality into two parts:

- Action Tasks, such as Reviews and other Tasks created by your practice such as 'Appointment with GP' or 'Reception to Action' for example and
- Coding Tasks, usually called 'Code Myself' or 'Code highlighted' or something of that nature.

Action Tasks do not allow you to Code a Document. An Action Task, therefore, has to be converted into a Coding Task.

Coding Tasks do not allow you to use 'Quick Steps' or 'Tasks' and can only be sent to another User or Group by using the 'Forward' action. Remember, 'Forwarding' passes on a Task as it was sent to you. So a Coding Task will be sent to the target user or group as a Coding Task, and the free text you add will only be visible in the 'Timeline'.

To convert a Task to a Coding Task you require your Practice to have a 'Coding Quick Step'. Docman usually set this up as 'Code Myself' when they migrate a Practice to Docman 10, however, this can be changed by your practice, so check with your System Administrator if you cannot find a 'Code Myself' Quick Step.

Go to the 'Quick Steps' and click on 'Code Myself'. Remember, using a Quick Step often completes the Task so ensure that any other required Tasks have been selected before the Task disappears.

The Quick Step will complete the Action Task that you were looking at and create a new Coding Task.

This will be the newest Task in your list, so if you have your Task List set to 'Oldest at the Top' the new Coding Task will be at the bottom of your List.

When you select the Coding Task, you'll notice the different actions on the right of your screen.

'Show Activity' and 'View in EMIS Web' remain as with an Action Task. Show Activity shows you the current activity for the Task. The Timeline shows the history of the Task, and clicking on 'View in EMIS Web' switches to that patient in EMIS Web.

'Add Clinical Code' is the first of the three ways to add a code that we are going to look at. Clicking on 'Add Clinical Code' opens the 'Clinical Code Browser'. This is the first time we've seen the Browser in this video so we'll go through it in some detail.

The Browser can switch between a Text Search and a Hierarchy.

Using the 'Search' you can type in your desired Code Term and the Browser will present what it thinks are the ten best suggestions. If it presents the code that you were after, click on the code and on the right of the Browser you will see information about that code.

The Code Term is presented next to the Read Code. If there is a preferred term it's displayed next to a letter 'P' circled in grey. You can click on this 'P' icon to change the preferred term.

Then the Browser display the Parents of the code, its synonyms and children. To view these terms, click on the appropriate drop down and you can change your selection to one of these terms by clicking on them.

Docman doesn't always find the Code Term that you were after. It may be worth checking the EMIS Code Browser to find the code.

If you wish to search for a code in Docman, prefix the code with a full stop, so for the code 'Total Cholesterol Measurement, type '.44PH'.

Another difference in searching for codes between EMIS and Docman is that the Docman search is case sensitive, so you must take care to make sure that each letter is correct.

To search using the Hierarchy, click on the Hierarchy Tab and either click on the code you wish to select or click on the horizontal view arrow to open the next level of the hierarchy.

Close a level by clicking on the downward pointing arrow.

When you've found the desired code, select it and click 'Confirm'.

The right-hand column contains the details of the code.

At the top, the code is specified. Underneath, Docman checks to see if the code is already present in the patient's record. If a patient doesn't already have this code the system states 'No previously coded terms found.' If the code is present, each entry is listed underneath with its clinical data. If you no longer wish to add the code, click 'Cancel' at the bottom of the column.

If you wish to proceed, confirm the date of the code. This can be done by:

- Clicking in the date box and using the calendar,
- Over-typing with the correct date, or
- Click on the Intellisense 'i' to the right. This will provide a drop-down of any dates the system has picked up on the document.

You can then add notes. This is the 'associated text' or 'free text' you add with a code in EMIS Web.

You can either type your notes in, or, using your mouse, drag a box around the text using the left mouse button. When you release the mouse button, the text should copy over into the 'Notes' box.

A tip to remember: Start above, and to the left of the first letter of the text that you are copying. Drag and cover the whole of each word you are copying. Even missing the bottom of a 'g' or a 'p' for example will mean that the system does not copy the word correctly. It's better to get bits of text that you don't want than failing to get all of the text that you do want.

Also, if you're copying multiple lines, copy the first line alone if your first word starts part-way along the line. Then copy the complete lines and copy the final line on its own only to include the text that you were after.

Always check the text has copied correctly. Some punctuation might copy incorrectly as symbols, and spaces and new lines may be inserted incorrectly.

You can then insert a value if appropriate. This can either be free-texted in, or when you click on the 'Value' field the system will highlight any values that it can find in the document in purple. Click on the purple highlighted value that you wish to apply and it will copy into the 'Value' box. If the value has an accompanying unit, that will also copy into the 'Unit' field. If the unit doesn't copy over you will have to select from the 'Unit' drop-down list. This drop-down is compiled by your system administrator so any additions need to be requested from them.

You can then select the 'Consultation Heading'. This orders the code in the Consultation that Docman creates in EMIS Web. The default Heading is configured by your system administrator. Click on the drop-down to select your Heading. For all Headings except 'Problem' there are no further options to select. If you select 'Problem' you'll be asked to choose the 'Problem Status': Active, Inactive or Health Administration; the 'Episode', for example, 'New' or 'Review' then the 'Significance' and the duration that the Problem remains active for.

The system does NOT suggest answers for these fields depending on the code as EMIS Web does, so if you rely on this feature in EMIS Web, check the code in EMIS Web.

Click 'Confirm' if you're satisfied with the information you've added. This adds the code to the Activity for the Task, but has not yet added the code to the patient's record. You can 'Remove' or 'Edit' the code by clicking on the options in the Code Box.

You then have the option to 'Cancel', 'Finish' or 'Save' the Code.

'Cancelling' removes the code from the Activity.

'Finish' applies the code to the patient's record and completes the Task.

'Save' applies the code to the patient's record but does not complete the Task. This may be useful if you need further information before completing the Task.

You can also continue and add further codes before choosing one of those options.

The second way to add a code is by selecting 'Add code from predefined list'. This list is configured by your practice and can be altered by your System Administrator. The 'Predefined list' is used to suggest frequently used and/or codes preferred by your Practice. The 'Pre-defined Codes List' is in the action column. Select the code and complete the fields as before.

The final way to search for a code is to drag your mouse over the term that appears in the document. Just as we demonstrated earlier with 'Adding Notes' using your mouse, drag a box around the text using the left mouse button. Remember to capture all parts of the text. When you release the button, the system will search for that code.

If you don't highlight the text correctly, just have another go and that will prompt another search.

If the code you're after doesn't appear, there's a 'Search' option below the list. Search for the term, press Enter and the code browser appears. Then select the code as we looked at previously.

Docman 10 also has a quick way to add Blood Pressure codes. The system reads every document for a Blood Pressure and displays the count on the 'BP Reading' button. If there are one or more counted, click on the button and the system will highlight the readings it's found. Click on the reading and it will copy into the field boxes. Click 'Confirm' to add the reading to the 'Activity' list.

The next action available is the 'Comment' button. Remember, 'Comments' only appear in the Timeline on Docman 10. They do not appear in EMIS Web, or send to other users in Docman. They may be useful when coding a Task to explain a coding decision for future reference. To add a Comment you can select from your Favourites, click on the 'Comments' button to select one from the list, or click on the Free Text field and type the Comment you wish to add. You then have the option to Cancel, Finish or Save the comment.

There is then the option to Decline the task. This requests that you have a 'Reason' for declining the Task, and then completes the Task.

The system does NOT send a task to the sender to tell them that the task has been declined. It's noted in the Tasks in the Timeline, and is more clear than simply using a 'Comment'.

'View Documents' takes you to the patient's document in Docman. This page is explained in detail in the 'Navigating Docman' video.

'Start Discussions' creates a 'Discussion'. This is explained in the 'Docman Discussions' video.

'Copy Text' allows you to highlight text in the document as with 'Coding' from the document or copying from the text for notes. Using your mouse, drag a box around the text using the left mouse button. When you release it appears in the dialog. You confirm that you wish to copy the stated text and then you're able to paste it into other applications such as Microsoft Word.

Documents can be printed or emailed using the corresponding buttons. The email functionality requires Outlook to be set up on the machine you're using.

'Medical History' shows all of the coded information in the patient's Care Record. If you're looking for a specific code, it's easier to find using your Browser 'Find' function. Press 'Control' and 'F' on your keyboard and start typing the term you're looking for. Your browser will highlight or locate the term you have typed in.

'Forward' allows you to send a Task onto another user or group. Remember, this sends the task onto the destination as you received it and the text that the system prompts you for only appears in the target user's Timeline for the task.

Once a code, or codes, have been added to the patient's Care Record they cannot be edited or removed from Docman. As a rule, anything added to EMIS Web through Docman can only be changed in EMIS Web. Any changes you apply in Docman 10 only apply in Docman 10.

To view the data entered into EMIS Web click 'View in EMIS Web' and open EMIS Web. You can see that the data is recorded in the Care History. Results are in the 'Investigations' tab, and all codes added together will be in the Consultation in the Consultations tab.

The Consultation for the coding is always separate from the consultation for the document itself. There's no way to have these two combined with the functionality as it is at present.